



Growth  
from  
Knowledge

# GfK Listening

## The Future of Listening Audience Measurement

Presented at EGTA

By

Simon Pearce, GfK Listening

March 2021



# Who we are...

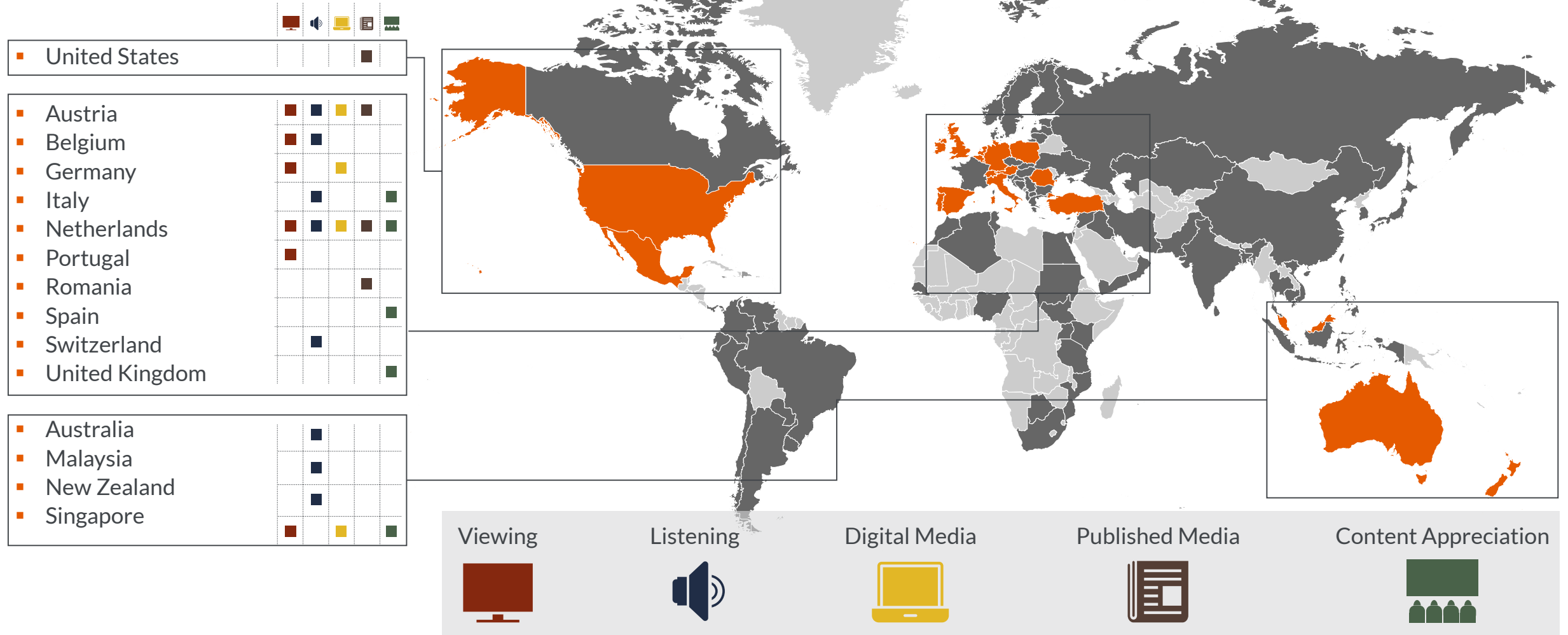


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GfK is the unparalleled, always-on, AI-powered intelligence platform and consulting service for the consumer products industry, globally.



# GfK MM – a global partner with local solutions



# GfK Listening



*Neutral and trusted providers of a holistic view of Listening behaviour for all relevant content platforms and distribution channels to the whole media industry in order to improve marketing ROI and content investments. We collect data in a tailor-made, efficient way, enrich with data science expertise and integrate for a holistic view.*



**Day After Recall**



**Diary**



**Media Watch**



**Digital Trends App**

**Respondent's Active Participation**

**Off-the shelf hardware**

**Headphone Listening**

**Source detection**

**Respondent's Passive Participation**

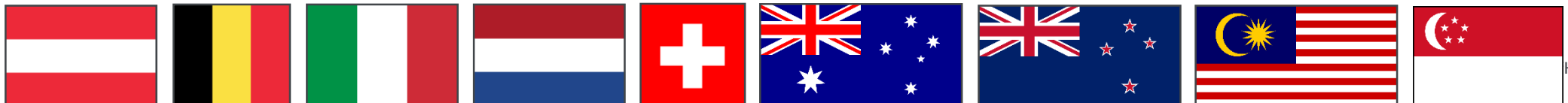
**GfK Hardware**

**No headphone Listening**

**Off-the shelf hardware**

**PoC Headphone Listening**

**No source detection**





# What we've been working on recently

# A Hybrid RAM Concept *est. 2013*



# GfK has always been a pioneer in the field of electronic radio measurement (eRAM)

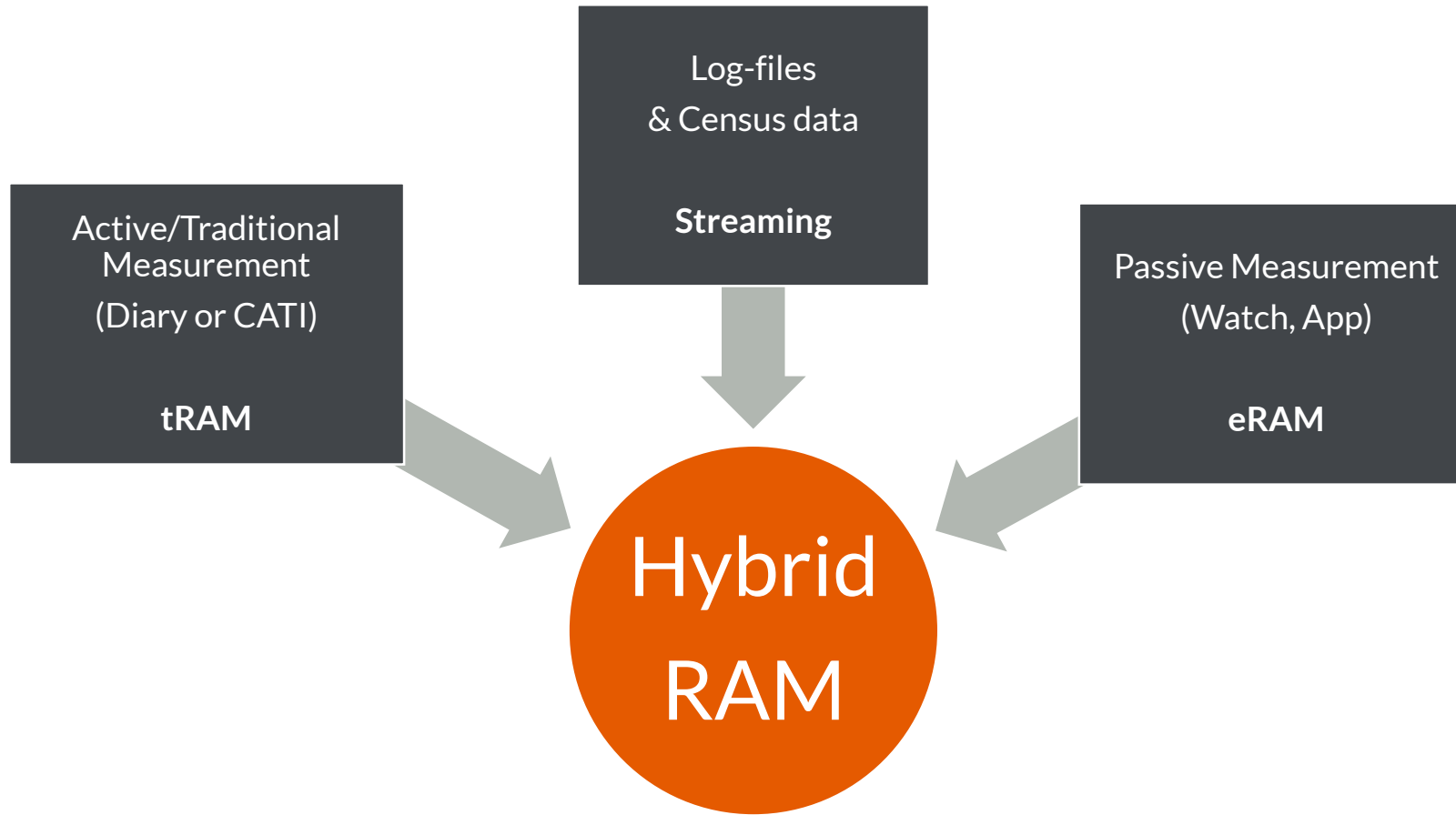


- The desire of advertisers is to have comparable methods and comparable KPIs to different media channels.
- However, there are many difficulties in migrating "classic" survey-based RAM currencies (tRAM) to an electronic measurement, including:
  - eRAM can be more expensive
  - Disruption for existing players and balances in the market
  - Difficulties for local/smaller transmitters
  - Headphone use, platform detection
- Therefore, a hybrid measurement approach, in which tRAM and eRAM data are mixed, would be a possible path way for countries where a single data source is insufficient. The reasons can be historical, economic, technical or methodical.
- In 2013 we started working on a concept for hybrid radio measurement because we believe that this is a good (transitional) solution.

# GfK Hybrid RAM



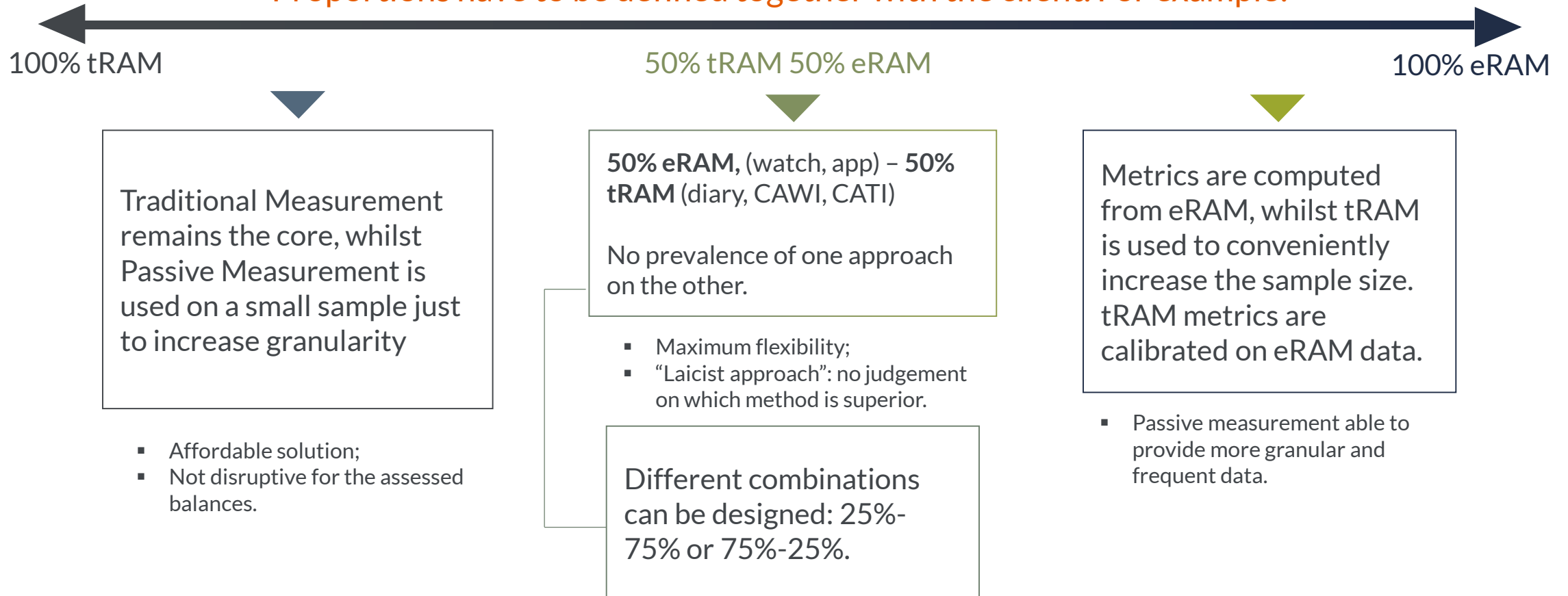
We develop an approach with the following data sources:



# GfK Hybrid RAM



Proportions have to be defined together with the client. For example:



Log files/streaming data are used in any of the above to integrate RAM and to provide the total audience. 1-min granularity for all solutions.

# Hybrid RAM studies



## Dutch Study



(2013)

- GfK tested a hybrid model using watch meter data;
- Converted diary quarter-of-hour data into minute-by-minute data
- This allowed to increase the granularity of the data analyses, keeping the fundamental metrics coming from tRAM.

## Swiss Study



(2019)

- eRAM since 20 years
- Explored using an App as a passive meter
- In-depth study provided strong learnings on the two data sets and how they could be merged together.
- Learned a great deal about eRAM app operations

## Super Pilot



(2019-20)

CRA, and the advertising industry, has shown interest in passive measurement offered by GfK.

1. Super Pilot project: Focus towards development of a new future currency – hybrid RAM
2. Calibration of eRAM (passive) against tRAM (active)

## Italian Studies



(2015-16)

In Italy we have run two hybrid studies.

1. Meter data for weekly (and monthly) reach merged with CATI data for daily reach and Average Quarter Hour data
2. Statistical model was used to mix CATI and meter data.



# Next steps for hybrid RAM



- Finalization of assessment of our hybrid RAM approach for a set-up
- Implement experiences from field testing with app based passive measurement into our latest app (Digital Trends)
- Investigation into Streaming Audio measurement integration
- Work has begun on a hybrid 'light' concept to support a currency with additional information rather than replace the currency

A stylized audio waveform background. The left half of the image is black, and the right half is white, separated by a diagonal line. A horizontal band of light, transitioning from yellow on the left to green and then blue on the right, passes through the center of the image, creating a glowing effect over the waveform lines.

# Measuring Streaming Audio

# Streamed (or digital) audio is...



Audio or radio that is played via a (IP) connected device\*

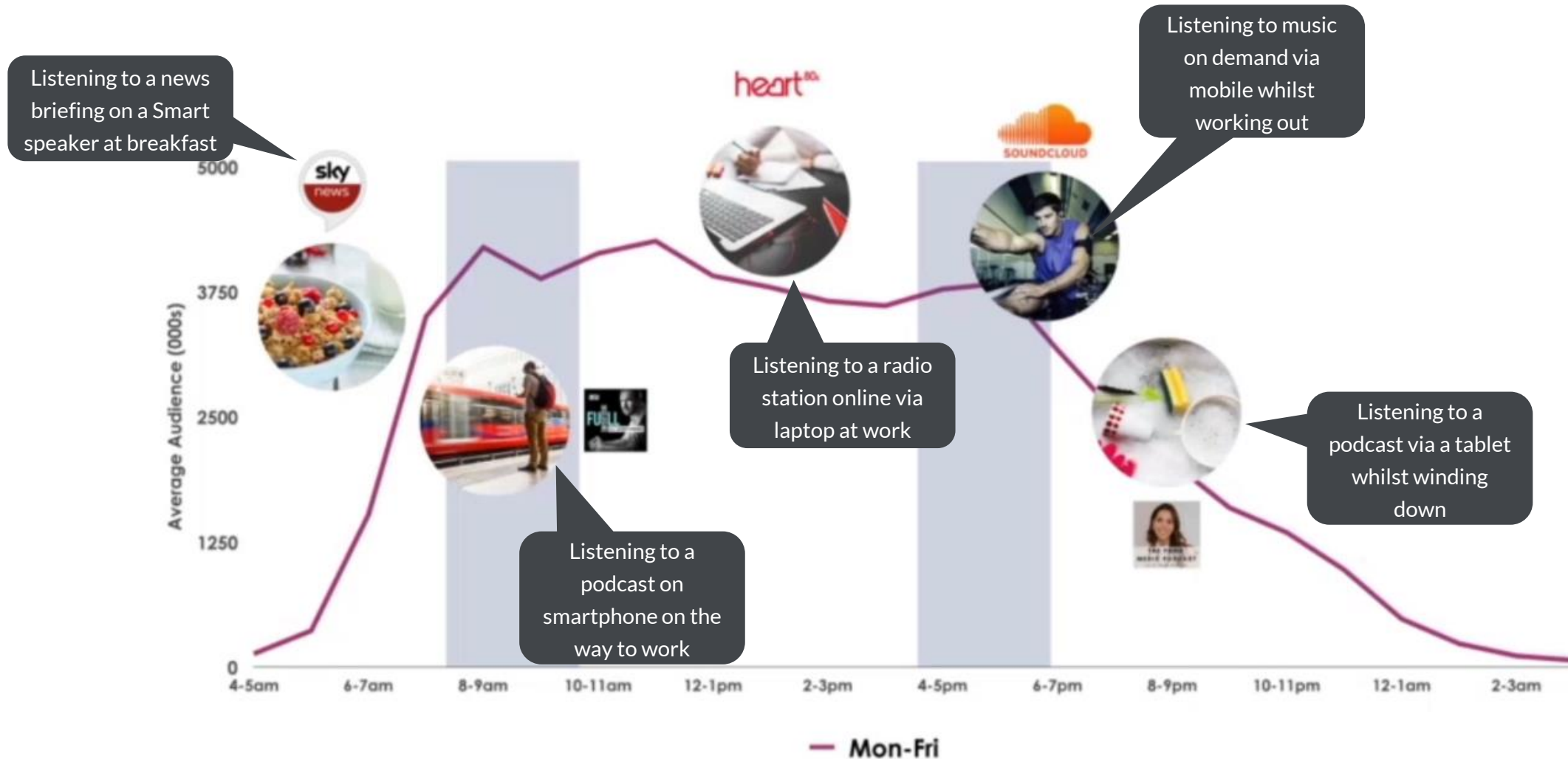
## Streaming Audio contains, but is not limited to;

- Live Radio Streams (linear, real-time)
- Radio Catch-up / Listen again streams
- Radio station podcasts
- Music Streaming Sites, aka On-demand Music Streaming (such as Spotify, Deezer, etc.)
- Podcasts
- Audiobooks
- And, in some cases, can also refer to owned music (MP3)

## Devices for Streaming include, but are not limited to;

- Mobile phones
- Desktop / laptop computer
- Smart Speakers
- Tablets
- Digital Media Players (iPod, Chromecast, Amazon Firestick, etc.)
- TV sets
- And, can also include... Portable games consoles (Nintendo DS, Sony PSP, etc.), Home games consoles (Sony Playstation, Xbox, etc.) Internet connect radio sets

# Streaming Audio day (pre lockdown)







*"The research is telling us that on the whole;  
Headphones = On Demand  
Listening, and,  
Speakers = Live Radio"*

James Cridland

*(Audio Futurologist & Guy that does a lot of research into this stuff)*

# Some stats

Streaming audio is growing



## 14%



- Listening to live linear radio via an app or online accounts for circa 14% of the listening time

## 25%



- Streaming Audio services outside of live linear radio account for circa 21-25% of all listening

## 41%



- In the US, 41% of Americans 12+ are consuming podcasts monthly.
  - 28% weekly

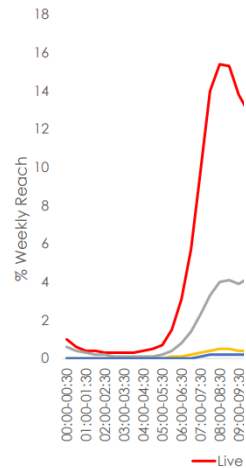
# Some stats

## 15-34s lead the way

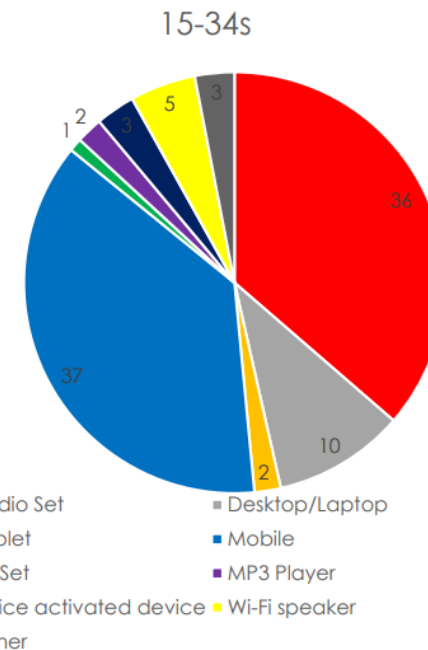
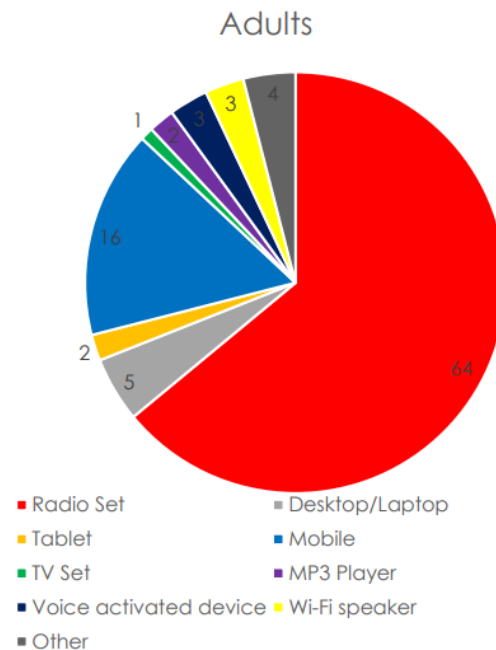


### Mobile Phone is more than double for 15-34's

#### Live radio reach

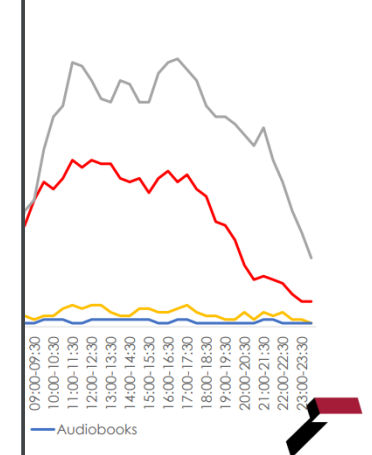


Digital Audio = Live Radio on mobile device, O  
Streamed music, Own personal digital music, N



Source: TouchPoints 2019

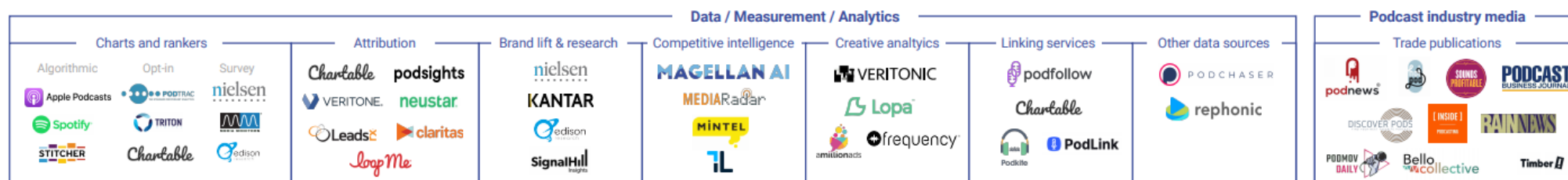
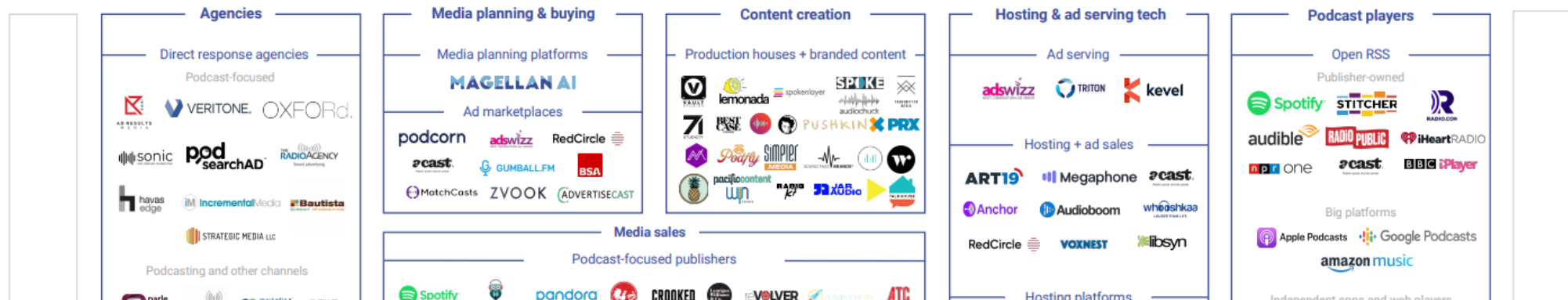
#### Sat-Sun



- 30% of all American audio listening happens via mobile

# This is just Podcasting

## 2020 PODSCAPE



Streaming Audio - An Overview

**MAGELLAN AI | SOUNDS PROFITABLE**

Produced by Magellan AI in partnership with Sounds Profitable.  
 Last updated on 12/14/20. Next release January 2021. Email [podscape@magellan.ai](mailto:podscape@magellan.ai) with questions.  
 © 2020 Magellan AI. All Rights Reserved.



# Top Streaming Audio platforms



## Spotify:

- 155m subscribers / 345m monthly active users (dec20)

## Apple Music:

- 60m subscribers (june19)

## Amazon Music:

- 55m subscribers (jan20)

## Tencent Music (China):

- 42.7m paying users / 657m monthly active users (march20)

## Soundcloud:

- 175m monthly active users

## Pandora:

- 6.2m subscribers

## iHeartRadio:

- 120m registered users

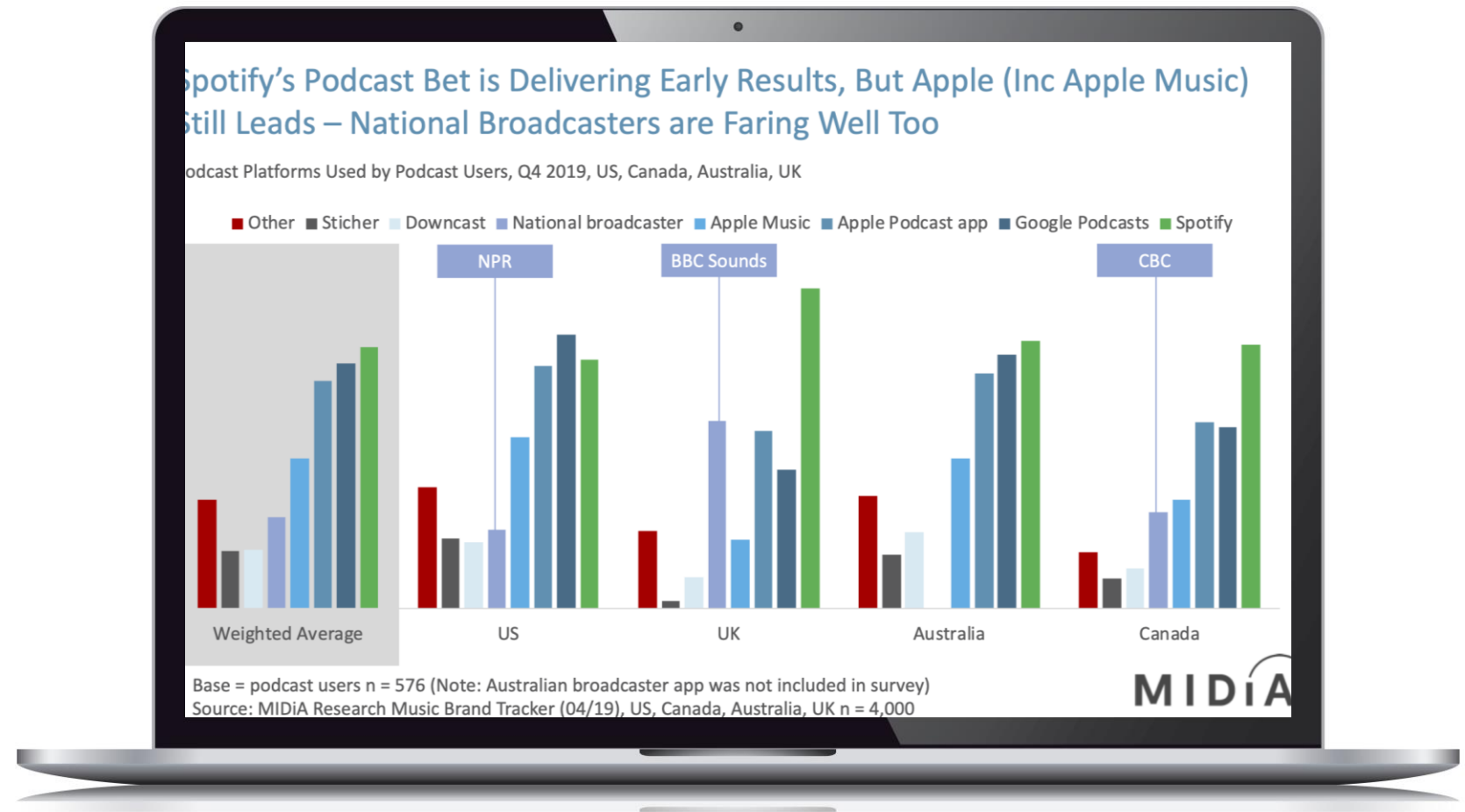



Square acquires TIDAL in majority ownership deal

<https://musically.com/2020/02/19/spotify-apple-how-many-users-big-music-streaming-services/>

# Top Podcast platforms

- Apple + Apple Music
- Spotify
- Google podcasts
- Downcast
- Stitcher





*“The primary opportunity, as we think about the long-term, is in the linear radio experience by moving online and into on-demand. That is the eye on the prize, the one that we are chasing.”*



Daniel Ek  
(Spotify Founder, CEO)  
February '21

# Radio / Audio 3.0



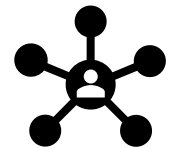
1.0

- Broadcast, Linear, Scheduled, One to Many, Closed

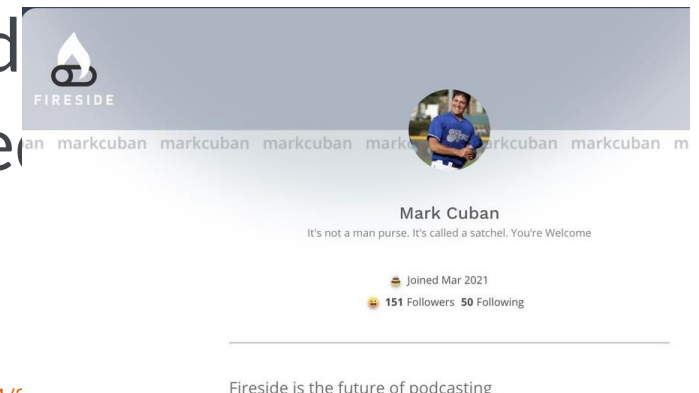
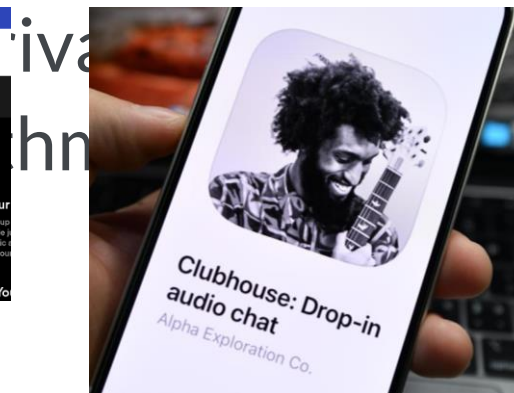
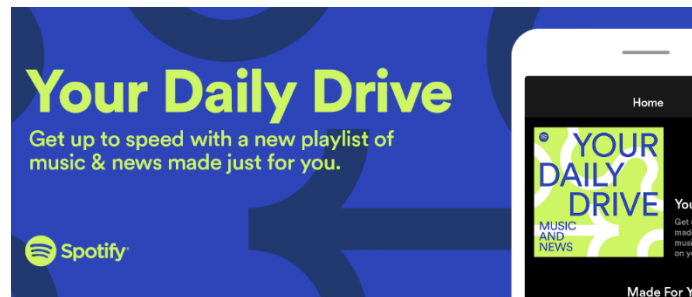


2.0

- On Demand (Streaming, Catch-up, Podcasts), Non-linear, User Experience, Many to Many, Open



3.0



[https://en.wikipedia.org/wiki/Clubhouse\\_\(app\)](https://en.wikipedia.org/wiki/Clubhouse_(app)) & <https://www.joinclubhouse.com/>

Fireside - <https://www.theverge.com/2021/3/17/22812000/mark-cuban-fireside-app-podcast-platform-clubhouse>



# What makes measuring streaming audio difficult...

# Issues with measuring streaming audio



## Lack of Consensus

### What to Measure

- Online broadcast radio
- Online only radio
- Aggregators
- Podcasts
- Audiobooks
- Online music video
- Social media music
- Live music events online

### How to Measure

- Sample
- Census
  - Server side
  - Client side
- Data fusion & Hybrid methods
- Podcast measurement challenge: download and streamed
- First-, second-, third-party data enrichment

# GfK & streamed audio (now)

# GfK & Streamed Audio



The current Listening tools...



- Perceived understatement in Active measurement of streams
- Long-tail difficult to capture (and it's long!)



- Reference library would need to be increased
- No headphone listening



- Reference library would need to be increased
- Headphone listening PoC not proved in field

# GfK & Streamed Audio

A census-based (SENSIC) solution



## All Streamed Audio Content from Broadcasters



Broadcast  
Linear Streams



Online Radio

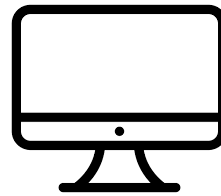


Online  
Video



Podcast /  
onDemand

## Across all Devices



Desktop



Mobile / Tablet

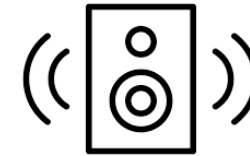


Smart TV

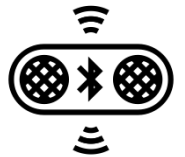


Smart Speakers

## Regardless of Output



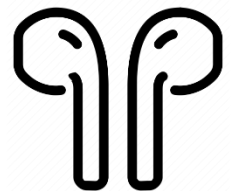
Built in  
Speakers



Connected  
Speakers



Wired  
Headphones



Wireless  
Headphones

We also do: Podcast surveys

# GfK & streamed audio (next)



# Adding Linear Streams to currency



## eDiary

Panelists recalled listening behavior  
Including: headphone, location, and platform



## MediaWatch4

Panelists passively recorded listening



## SENSIC

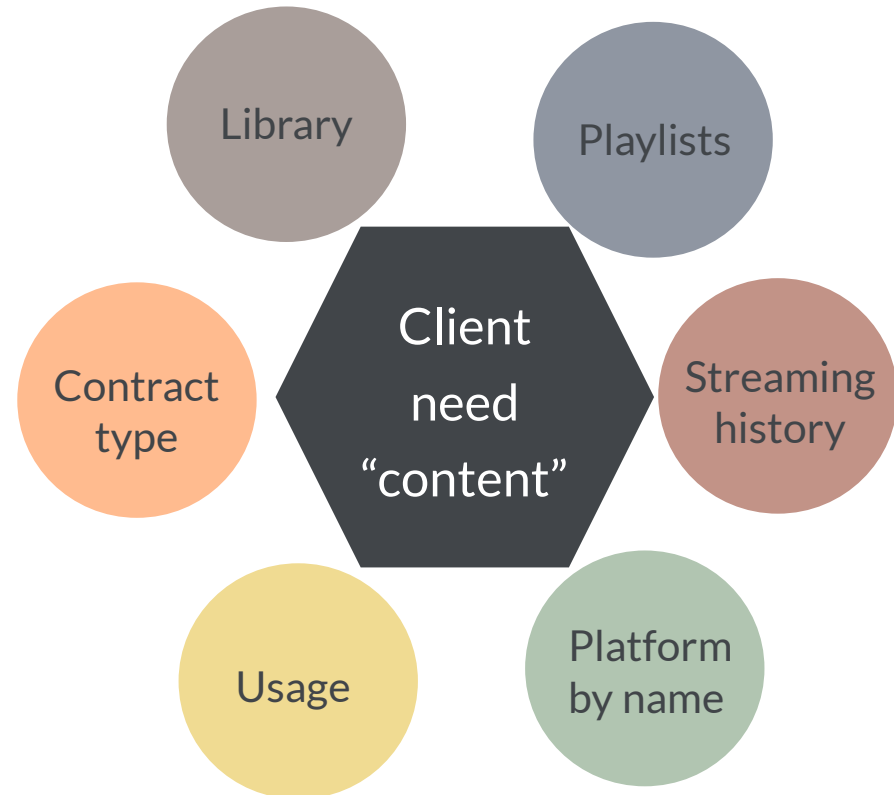
Census server-side tagging of audio / video  
streams

Work in  
Progress

Concept: Linking all three sources via claimed behaviour and streamed audio's time delay enables GfK to  
build a hybrid solution that measures broadcast and linear streamed audio

Benefit: Deals with duplication, Profiles the streaming user, and, Provides access to the long-tail

# On demand audio (title level listening)



- Who hears when, which title, album, artist / podcast, genre, how often, for how long?
- How many songs does target group listen to in total per period (from one artist / genre)?
- How many songs per artist are there for one listener?
- How many songs / episodes from an artist / podcast are heard on average?
- Which title, album, artist / podcast, genre is heard when, how often / for how long?
- What does the “listener profile” of artists, genres, etc. look like? Which target groups are reached by which content?
- How many songs does target group listen to in total per week / period?
- What do Free Streamer, Premium, Family listen to on Spotify, Amazon, Apple?
- How do platforms differ by day of the week and time of day?

# Capturing OnDemand Listening

Consumer Panel & GfK Entertainment



## Step 1 – Panellist applies for his data

4 X p. a. panellist will be asked by GfK to apply for streaming data at their streaming provider (platforms)



## Step 2 – Streaming platform sends data

Within 5-30 days streaming data will be send to panellists by the platforms

## Step 3 – Download

Panellist downloads his streaming data

## Step 4 – data collection

Downloaded data (\*zip-files) could be uploaded at the GfK platform

Source: [Christoph.Zeh@GfK.com](mailto:Christoph.Zeh@GfK.com)

# Final thoughts...



Streaming Audio  
measurement is yet to  
be nailed...

... but there are  
competitors offering  
more than us.

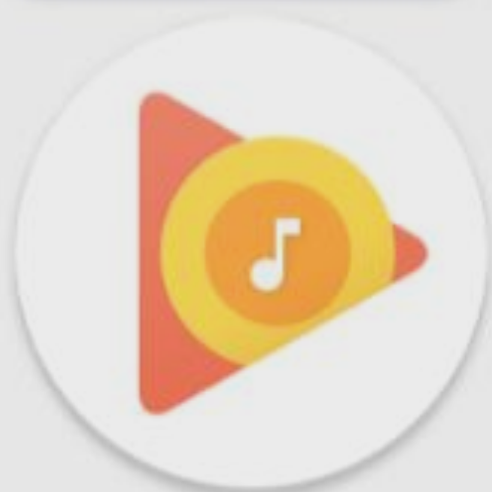



A hand with a pinky finger extended points towards a glass sphere. The sphere is partially filled with a green liquid and contains a small, dark, fish-like object. The background is a solid green color. The text "Have podcasts grown too big / too fast?" is overlaid on the right side of the image.

Have podcasts grown  
too big / too fast?



# Streaming Audio is here to stay



A person is lying down, wearing a dark long-sleeved shirt and dark pants. They are holding a large, silver boombox against their chest. The boombox has two large circular speakers and a cassette slot. The person's legs are bent at the knees, and their feet are visible in the foreground, wearing brown shoes. The background is a plain, light-colored wall.

But radio isn't going  
anywhere soon

